Securities - A smart way to give

Support SOS in one of the most tax-efficient ways while potentially reducing your tax burden

Donating publicly traded securities is one of the most tax-efficient ways to support a registered charity. When you donate appreciated stocks, ETFs (exchange-traded funds), mutual funds, or other eligible securities directly to a registered charity like SOS, you receive a charitable tax receipt for the full fair market value of the securities on the date of the gift. In addition, you may claim charitable donation tax credits that help reduce your income taxes. [canada.ca]

Unlike selling securities and donating the cash, a direct donation of eligible securities eliminates the capital gains tax that would otherwise apply to the increase in value of the investment. This allows you to maximize the impact of your gift while potentially reducing your overall tax burden. By avoiding capital gains tax and receiving a charitable tax credit, you can often make a larger charitable contribution at a lower after-tax cost. [canada.ca]

- ✓ Receive a charitable tax receipt for the full fair market value of eligible securities
- ✓ Avoid capital gains tax on appreciated securities when donated directly
- ✓ Potentially reduce your income taxes through charitable donation tax credits
- ✓ Increase your philanthropic impact at a lower after-tax cost

It's a simple 3-step process:

- Transfer securities from your brokerage account.
- SOS receives the securities.
- Receive a charitable tax receipt and support vital community programs.

Eligible securities examples:

- Publicly traded stocks
- Mutual funds
- ETFs
- Bonds
- Other publicly traded securities

Interested in donating securities? Speak with your financial advisor or tax professional to learn how this giving option may benefit you and the causes you care about.

To make a confidential inquiry about donating assets to SOS, please contact Sharon at 250.248.2093 ext. 251 or email resource@sosd69.com

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